

# Reliable data for faster decisions with Unit4 FP&A



## Johannesbad Holding SE & Co. KG



Johannesbad Group is one of the largest health service providers and among the top 10 rehabilitation providers in Germany. It offers clinics, outpatient rehabilitation, dental care and hotels as well as its own educational facilities. The group has been working with Unit4 Financial Planning & Analysis (Unit4 FP&A) since 2019. Mario Gebetsberger, Head of Finance & Controlling, considers this a quantum leap.

Johannesbad is a growth-oriented player with a variety of different companies within its holding company. Unit4 FP&A provides them with a flexible and scalable solution.

The key benefits:

- **Simple, intuitive use**
- **Scalable and flexible**
- **Single source of truth**
- **Fast access to new insights**
- **Planning and analysis** from group to profit center level

### “We had very clear ideas of what the system had to deliver.”

Johannesbad Group is a market leader in the healthcare sector. With around 2,300 employees and a turnover of EUR 140 million, the company is one of Germany's top 10 rehabilitation providers. The group runs nine specialist clinics, two outpatient centers, a spa, seven hotels, six dental practices and two specialist medical schools. Its complexity and growth require state-of-the-art solutions for FP&A and HR.

Since 2019, Johannesbad has been using the planning, budgeting and forecasting solution Unit4 FP&A to manage its many different companies. The reliable data provided by the system enables rapid decision-making and supports the market leader's outstanding performance.

So, how do you get to be one of the top 10 healthcare providers? Mario Gebetsberger, Head of Finance & Controlling at the Johannesbad Group, reflects: “Even back in the 90s, our group structure comprised many different

### Industry

Healthcare

### Location

Bad Füssing

### Size

Around 2,300 employees, EUR 140 million turnover

### Product

Unit4 Financial Planning & Analysis (FP&A; formerly known as “Prevero”)

### Challenges

Move from an inefficient, Excel-based system to Unit4 FP&A for secure management of the group's broad variety of companies and business models. As a labor-intensive service provider in the healthcare sector, Johannesbad is using Unit4 for finance management, project management, operational reporting and to secure the group's consistent growth.

### Key Figures

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need for additional trainings due to high usability.

100%

staff satisfaction

## “Unit4 FP&A was a quantum leap for us. It provides us with the best possible support.”

**Mario Gebetsberger**

Head of Finance & Controlling, Johannesbad Group

companies. Financial controlling or FP&A in its current form simply did not exist. The challenge then was to structure the whole thing, to harmonize the companies and reflect that in an Excel structure.”

### “We had what felt like millions of Excel tables.”

However, this solution often presented unexpected obstacles and challenges. Gebetsberger explains, “We had what felt like millions of Excel tables. Excel offers many possibilities, but also has its limits. We needed simulations at short notice to support our decision-making process, but the system wasn’t capable of providing them on group level. It became increasingly difficult when there were follow-up questions or complex issues within individual divisions.”

Therefore, Johannesbad began to think about introducing a professional planning solution. In 2006, they implemented Unit4 Professional Planner. And they kept on growing: New locations were opened, the rehabilitation division was expanded to include outpatient rehab, the dental medicine and hospitality divisions were added – and the requirements for FP&A became even more complex. Johannesbad then decided to take the logical next step and move to Unit4 FP&A.

“Of course, we first looked at a variety of providers,” explains Gebetsberger. “It was important to us to find a flexible system that had potential for further development and didn’t come from a two-man firm. We wanted a system that could take us into the future.”

The challenges included the sheer number of companies and the variety of company sizes and business models, all of which had to be brought together. Gebetsberger explains: “Bringing everything into a unified structure was a challenge. To consolidate, match and create mappings, we went through several phases. In 2006, the account structure still held the biggest challenges. Then we developed further, which also included profit center structures, cost types and revenue structures. Unit4 FP&A was a quantum leap for us. It’s a perfect fit for the multidimensional requirements of a complex company and enables us to react very quickly by setting up new scenarios, changing periods and logics. The system supports us in our decision-making in the best possible way.”

### “The consultants are very hands-on. They know what they’re doing.”

Consulting also played a part in the decision to go with Unit4 FP&A. Gebetsberger explains, “The consultants at Unit4 are very hands-on and have an excellent understanding of our complex system. They know what they’re doing. We had very clear ideas of what the system had to deliver – it needed to provide the right level of detail for sales planning, for example – and we made several adjustments to get there. The Unit4 consultants were absolutely willing to go along with that.”

The move to Unit4 FP&A in 2019 was completed in just three months, from kick-off to the first go-live of the budget planning module.

Gebetsberger summarizes, “The move to Unit4 FP&A was a quantum leap in terms of performance, data management and the versatility to incorporate new business areas and integrate standards. The biggest advantage is the system’s flexibility. We can do so much more than before and provide our management with reliable data. Certain workflows such as report generation have been automated to make us much more agile. We even did a lot of the implementation ourselves. Now we can make all adjustments quickly, easily and independently, for example introducing rolling forecasts or making changes to company structures. The planning logics make our lives significantly easier. We use the system for almost all of our planning and simulations.”

Looking at other industries, Gebetsberger adds, “I can’t imagine that there is any industry sector that cannot work with the Unit4 system. After all, if Johannesbad can successfully use it with so many business areas, then Unit4 FP&A will be even easier to implement elsewhere as a pure industry solution.”

**“Efficient structures and processes, scalable, highly automated.”**

The ongoing HR costs for Unit4 FP&A are very transparent, with five power user licenses in the Controlling department and a few licenses for supporting staff. The next major step has already been planned: As a company with high personnel requirements where more than

50% of all costs are made up by HR, Johannesbad is also planning to implement Unit4’s People Planning & Analytics module.

Healthcare continues to be a megatrend. Johannesbad is expecting further growth in almost all business areas. Gebetsberger explains, “Unit4 FP&A is like a tailor-made suit for us. With even more data to handle and increasing demands, Unit4 will continue

to support us with efficient structures and processes. The solution is scalable, highly automated, fits perfectly into our process environment, provides easy access to information and supports us in the implementation of our finance and controlling strategy.”

